

## DOE ARRA Amended Local Plan – Cover Page

---

**Due Date** No later than 10 working days after the approval of the Davis-Bacon Plan.

---

**Email To** [localplan@csd.ca.gov](mailto:localplan@csd.ca.gov)

---

**Contact for Questions**

<b>Agency Name</b>	Fresno County Economic Opportunities Commission (FCEOC)
<b>Contact Person</b>	Glenn Elliott
<b>Title</b>	Energy Program Director
<b>Phone Number</b>	559-263-1587
<b>Email</b>	<a href="mailto:glenn.elliott@fresnoeoc.org">glenn.elliott@fresnoeoc.org</a>

---

**Participation Acceptance**

Our agency is interested in participating in the DOE ARRA Program. We certify that we have the capacity to provide the required services within our service territory as outlined in the Local Plan.

<b>Signature</b>	
<b>Name</b>	George Egawa
<b>Title</b>	Assistant Executive Director
<b>Phone Number</b>	559-263-1030
<b>Email</b>	<a href="mailto:george.egawa@fresnoeoc.org">george.egawa@fresnoeoc.org</a>
<b>Date</b>	

---

**CSD Approval**

<b>Approved by</b>	
<b>Approval Date</b>	

---

## DOE ARRA Amended Local Plan

### Instructions

It is important to first read the DOE ARRA Local Plan Instructions provided as a separate document before completing this plan.

### General Plan

**Describe your current progress towards your local plan goals and ramp-up to increase capacity and outreach in anticipation of receiving the DOE ARRA Production contract.**

FCEOC subcontracts all of the weatherization field operations to a licensed weatherization contractor. In response to the announcement of the DOE ARRA funding, FCEOC and its subcontractor began ramping-up in June 2009. Operations have been completely ramped-up to a capacity necessary to complete the ARRA DOE production levels.

Due to the delays in the 40% production funding, training program, and program guidance, the increased capacity was utilized to complete 2009 LIHEAP jobs. Consequently, the 2009 LIHEAP funds have been depleted. We were planning to use the DOE Regular funding to continue operations until the DOE ARRA funds were received. However, with the DOE Regular funds postponed, we are out of production funding. If production funding is not received soon, a crew lay-off will be necessary. If crews are layed-off, they will likely find other jobs and we will need to go through the ramp-up process all over again (recruiting, hiring, training, etc). Note: We have nearly exhausted the T&TA portion of the budget with existing crew ramp-up. This training expense, that is nearly exhausted, is related to classroom training costs only.

The CSD Online Training Program and instructions were received and nearly all crewmembers have completed this training. The 10% DOE ARRA T&TA will be used to help retain crews and keep them occupied with training, during the ramp-up period.

**In reviewing the amount of your allocation, will you be able to build capacity enough to accept and spend the total amount for your entire service area?**

Yes

**If not, what % of the allocation can you accept?**

**For multi-county agencies, will you have the capacity to spend funds proportionate to each county's allocation and meet the 50% threshold in each county by the required deadline?**

### Outreach to Potential Clients

**Describe how you will increase your outreach efforts to reach the necessary number of low-income clients needed to meet your ARRA production goals. If you are a multi-county agency, describe how this will be accomplished in each county.**

Outreach efforts are conducted by Energy Specialists (ES). In addition to follow-up on referrals provided by PG&E Energy Partners and the ECIP/HEAP program, ES staff canvas low-income neighborhoods to find eligible households. Increasing the number of ES personnel will proportionately increase the number of low-income clients reached.

Initially, eight additional ES trainees have been hired for the ARRA ramp up. Field training is the most important factor in outreach success. Each experienced ES has a trainee "ride along" and is responsible for training the ES trainee. In addition, three of the Weatherization Specialist Lead personnel are also fully qualified to conduct outreach and assessment; as weatherization crew production increases, the Lead personnel can be dedicated to training new outreach and assessment personnel.

The current outreach staff is producing at the necessary rate to complete the ARRA DOE weatherization services (approx. 20-24 client/units per day). Additionally, three experienced outreach personnel are currently working in weatherization production. These weatherization crewmembers can be transferred to outreach activities, if needed.

**Identify the main Action Steps required to achieve the goals above utilizing specifics such as timelines, potential partners, marketing plans, etc...**

All steps have been taken to achieve the goals above.

**Detail progress made in this arena with respect to actual, tangible achievements. Be specific with regards to dates, details, and participants.**

Ramp-up has been completed.

#### **Outreach to Elected Officials**

**Describe how you will increase your outreach efforts to educate, and possibly partner with, your local elected officials. If you are a multi-county agency, describe how this will be accomplished in each county.**

FCEOC has an ongoing relationship with the City of Fresno Mayor, City Council members, members of the County Board of Supervisors, and State Representatives. Meetings have been held to educate these elected officials and discuss potential partnerships.

**Identify the main Action Steps required to achieve the goals above utilizing specifics such as timelines, contact people, etc...**

FCEOC has an ongoing relationship with local elected officials. A dialog regarding federal stimulus activities and progress is ongoing.

**Detail progress made in this arena with respect to actual, tangible achievements. Be specific with regards to dates, details, and participants.**

FCEOC has an ongoing relationship with local elected officials.

**Outreach to  
Potential  
Partners and  
Community**

**Describe how you will increase your outreach efforts to educate and inform the community at large and create an environment that fosters partnerships in your local community. If you are a multi-county agency, describe how this will be accomplished in each county.**

FCEOC has Public Relations staff that provides ongoing information to the community at large to keep them informed and create an environment that fosters partnerships. The following are methods used to disseminate information to the community:

- News releases to local television stations and newspapers.
- Scheduled appearances on Community Affairs/Talk Shows.
- Public Service Announcements.
- Articles in the FCEOC newsletter, distributed throughout the community.
- Distribution of program brochures.
- Postings on the Agency website and intranet.
- Piggyback outreach response from PG&E's LIEE marketing of mailers, radio/TV ads, etc. to leverage with DOE ARRA.

**Identify the main Action Steps required to achieve the goals above utilizing specifics such as timelines, contact people, etc...**

Community education is provided on an ongoing basis.

**Detail progress made in this arena with respect to actual, tangible achievements. Be specific with regards to dates, details, and participants.**

A mechanism to educate the community is already in place.

**Quality  
Assurance**

For each question in this section, provide a comprehensive narrative on your current processes and what changes you will make to increase the oversight of program staff and subcontractors to ensure that:

**Only eligible households are served and that priority will be given to vulnerable populations and those with high energy burden per DOE regulations.**

In Fresno County there is no waiting list for weatherization services. All eligible households receive weatherization services immediately, including vulnerable populations and those with high-energy burden. FCEOC conducts file monitoring to ensure only eligible households are served. Exemption: FCEOC is leveraging this program with LIEE. Leveraged work included is repair & replacement work for Health & Safety, work which is first referred to PG&E. This reduces the DOE R&R budget and is done to increase the number of clients served by DOE. PG&E has a policy that does not offer major R&R work to renters; maintenance that is legally required by the property owner. FCEOC has the same policy; deferment forms are left with the client to aid in communication with the landlord for necessary repairs.

**Only feasible measures are installed, all measures billed to CSD were installed, and workmanship meets CSD standards.**

LIHEAP and DOE units are leveraged with the PGE Energy Partners program (LIEE). PGE Inspectors inspect all units and measures installed. If a measure fails for any reason, no payment is made. A list of failed measures is reported by job and by individual WS installer. Weekly weatherization crew meetings cover updates and changes in standards. Crewmember pass/fail rates are reviewed and each inspection fail measure is reviewed with the individual WS; disciplinary protocols are enforced, if needed.

Currently, there are six (6) levels of Quality Assurance in the field:

1. Contractor Post-Inspection (100%)
  - a. 10% gas analysis reading verification (PG&E already performing approximately 30%)
  - b. 10% blower door post pressure test reading verification
  - c. 10% duct blaster
2. PG&E post inspections for LIEE (25%-30%)
3. RHA random weekly post inspections for LIEE
4. CSD periodic field post inspection
5. FCEOC Weatherization Inspector/Compliance Monitor inspections
6. Customer satisfaction survey (telephone)

Note: With homes leveraged with LIEE, requiring 100% post inspection under the DOE ARRA is excessive and exacerbates the intrusion into the clients home.

A system has been developed for tracking installed measures through the invoicing and billing process. All invoice charges from the subcontractor to FCEOC are reviewed prior to billings being submitted to CSD. FCEOC also conducts random field and file monitoring to ensure measures billed to CSD are installed and billed correctly. FCEOC has hired a Weatherization Inspector/Compliance Monitor to handle the increased monitoring required for the DOE ARRA program.

**All records meet CSD standards, billing is accurate and truthful, and reports are submitted on time.**

A system has been developed for tracking installed measures through the invoicing and billing process. All invoice charges from the subcontractor to FCEOC are reviewed prior to billings being submitted to CSD. FCEOC also conducts random file monitoring to ensure measures billed to CSD are billed correctly.

FCEOC has hired a Financial Analyst to provide more in-depth scrutiny of billing records, systems, procedures, and financial data.

In addition to a thorough review and internal control procedures, the FCEOC Finance Office has a list of report due dates and ensures reports are completed on a timely basis.

Describe in detail the applicable Action Items that will need to be addressed in order to achieve compliance in the above three areas. Specify how these action items will be achieved through the concepts of who is responsible, how and when the actions will occur, and why the action is important.

A Weatherization Inspector/Compliance Monitor has been hired to facilitate the increased monitoring demands of the DOE ARRA program. The Weatherization Inspector/Compliance Monitor will assist in developing detailed procedures and a Quality Control Plan to ensure quality, accuracy, and compliance.

**Workforce  
Development**

Enter the total number of in-house employees currently working in CSD weatherization and HCS programs in the following positions. Count each employee only once. If only a portion of an employee's time is charged to the program, count that person as one.

Position	Total
Admin / Fiscal	10
Program Management	3
Program Support	1
Intake	1
Outreach	
Other -	

Enter the total number of subcontracted employees currently working in CSD weatherization and HCS programs in the following positions. Count each subcontracted employee only once. If only a portion of an employee's time is charged to the program, count that person as one.

Position	Total
Admin / Fiscal	3
Program Management	1
Program Support	3
Intake	2
Outreach	8
Other - Crews	27

Describe your plans for building up your in-house workforce to meet the capacity needed to perform the ARRA program.

A Financial Analyst, Inspector/Compliance Monitor, Training Program Coordinator, and Program Assistant have been hired to build up capacity for the DOE ARRA program.

FCEOC's subcontractor has sufficiently built up its workforce to achieve the goals of the DOE ARRA program.

**Describe how you will develop partnerships with local workforce investment advocates in order to achieve the objectives outlined above.**

FCEOC and its subcontractor partnered with the Fresno Workforce Investment Board and the FCEOC Workforce Connection program to recruit, screen, and hire low-income individuals to work in weatherization administrative, assessor, and installation positions. The Fresno WIB supplemented some of the trainee wages with OJT contracts. These training contracts are completed and trainees continue to work full time.

**Provide a timeline that corresponds to the above workforce development plan.**

FCEOC and the FCEOC subcontractor have completed the process of building up its workforce.

**Describe your plans for building up your workforce by outsourcing to meet the capacity needed to perform the ARRA program.**

FCEOC and the FCEOC subcontractor have completed the process of building up its workforce. The capacity is in place to perform the ARRA program.

**Describe your action plan for outsourcing, including a description of the RFQ/bidding process, how interested parties will be informed of this opportunity, and provide a timeline for aligning subcontractors to provide timely delivery of services. Also describe your action plan for oversight of subcontractors.**

An RFQ process was completed in October 2009. The RFQ was distributed to multiple weatherization contractors in the area and published in the local Business Journal. Eight contractors submitted RFQs and only four met the minimum requirements. The subcontract was awarded to Sundowner Insulation.

**If you are not outsourcing any of your workforces, explain why.**

N/A

**Other  
Subcontracting**

**Describe your plans for procuring of material goods and services from third parties, how the agency plans to inform interested parties within the local community of subcontracting opportunities, and your action plan for oversight of subcontractors.**  
All weatherization material goods are procured and purchased by the subcontractor.

**Vehicle &  
Equipment over  
\$5,000 per Unit**

If you are planning on charging any portion of vehicle and equipment purchases to ARRA, enter the following information related to these purchases. This will require DOE approval.

Item	Quantity	Est. Cost
All equipment over \$5,000 is procured and purchased by the subcontractor.		

**Barriers**

**Identify any barriers that you feel you may face in meeting the requirements of ARRA (subcontracting, workforce development, outreach & marketing, quality assurance and oversight, compliance with DOE requirements, fiscal requirements and reporting, performance).**

The delay in receiving the 40% production funding, if delayed much longer, will force a lay-off of the crews that have been hired to ramp-up. If a lay-off occurs, the ramp-up effort will have been for nothing. Ramp-up efforts will need to be restarted after the 40% production funds have been received.

Requiring 100% post inspection under the DOE ARRA is excessive and exacerbates the intrusion into the clients' homes.

Requiring a separate Weatherization Crew for the jobs that do not qualify for infiltration measures is very intrusive to the clients and an inefficient use of production time. EXPLANATION- There is a small percentage of homes that for safety reasons cannot be corrected yet still qualify for weatherization through the installation of CFLs and Hardwire lights, water measures of showerheads and faucet aerators and water heater blanket, and other non-infiltration measures. The duration of labor time is very short in performing the installation of these measures. The crew will not be performing blower door pressure testing, duct pressure testing, and the long menu of infiltration measures that requires the length of time and equipment requiring a fully dedicated weatherization crew.

**Describe what assistance you will need from CSD.**

Bear in mind, PG&E will be performing post inspections on approximately 30% of the homes weatherized. As 100% contractor post inspections ensue and quality control is proven, a reduction in the post inspection percentage should be considered by CSD.

For weatherization jobs not requiring infiltration measures, CSD can waive the requirement for a Weatherization Crew to be separate from the Assessment Crew. CSD and DOE can recognize that a separate Post Inspection from the Assessment Crew will be performed.



**Attached  
Document  
Checklist**

Document	Attached?
Ramp Up Schedule	X
Field Staff Training Logs for Agency Staff & Subcontractors	previous
Diagnostic Equipment Log	X
Disclosure of Findings	previous
Disclosure of Legal Proceedings	previous

**Comments**

**Enter any comments you wish to make relative to the Local Plan and ARRA.**

There are new developments in the Health & Safety portion of our weatherization work. This may impact budget restrictions.

1. New code effective 01/01/10 requires an Ultra Low-Nox Water Heater unit upon replacement. (see attached Change Notification from Air Quality Management District). The problems are an estimated \$150 - \$200 increase in material costs and lack of product availability due to supply issues. The cost limit for Tier 1 needs to be adjusted for this reason.
2. For replacement of Heaters and Air Conditioners for central air, new codes from the State of California take effect 01/01/10. In order for officials to conduct remote energy use readings, from off-site of the client's residence, additional retrofit installation of sensors, watt meters, amperage reading instruments, flow rates, etc... must be additionally installed to the units. Cost limits again may need to be adjusted.
3. LIEE Repair and Replacements are currently being severely curtailed and restricted by PG&E. In many more cases, PG&E is asking their R&R subcontractors to refer their client work to LIHEAP. Many of these referrals are from clients that received their weatherization services from a competing LIEE contractor in Fresno County. Because of energy conservation measures previously installed by the competing contractor, most of these homes do not qualify for LIHEAP or DOE because there is not enough qualifying measures to install. In the other scenario, if there is a minimum qualifying number of energy conservation measures to install, the apportion budget dollars to the program funding is much higher to the Health & Safety category. DOE will then be installing much less energy savings per client household. This bears awareness by CSD and administrative controls by FCEOC.

## DOE ARRA Amended Local Plan – Addendum 1 Cover Page

---

**Due Date** No later than 10 working days after the approval of the Davis-Bacon Plan

---

**Email to** Your field representative

---

**Contact for Questions**

<b>Agency Name</b>	Fresno County Economic Opportunities Commission (FCEOC)
<b>Contact Person</b>	Glenn Elliott
<b>Title</b>	Energy Program Director
<b>Phone Number</b>	559-263-1587
<b>Email</b>	<a href="mailto:glenn.elliott@fresnoeoc.org">glenn.elliott@fresnoeoc.org</a>

---

**CSD Approval**

<b>Approved by</b>	
<b>Approval Date</b>	

---

## DOE ARRA Amended Local Plan – Addendum 1

### Instructions

If you need additional funding for intake, outreach and/or client education, you must provide justification for the increased need. If you do not need any additional funding, enter zero under the first question for each expense line item below.

### Additional Intake Justification

Intake is currently limited to 2% of your total contract. How much additional funding will you need to support expanded or different approaches for carrying out intake services? (Enter the dollar amount.)

\$0.00

If you are requesting additional funds, describe the differences in strategy and design for delivering intake as compared to what you proportionately spend in a normal year.

### Additional Outreach Justification

Outreach is currently limited to 5% of your total contract. How much additional funding will you need to support expanded or different approaches for carrying out outreach services? (Enter the dollar amount.)

\$0.00

If you are requesting additional funds, describe the differences in strategy and design for delivering outreach as compared to what you proportionately spend in a normal year.

Although we are not requesting additional funds, this issue needs to be addressed for future considerations: FCEOC has always maintained a very low average billing per unit, serving more client households per budget dollar. Because of this, outreach has to increase by a factor of two to four times as much as normal. However, because we collect a fee from LIEE for a separate and differing structural and income documentation, we are not asking for additional funds here. However, if there is an interruption to LIEE leveraging, we will continue to experience much more outreach than normal in our service area.

### Additional Client Education Justification

Client Education is currently limited to 5% of your total contract. How much additional funding will you need to support expanded or different approaches for carrying out client education services? (Enter the dollar amount.)

\$0.00

If you are requesting additional funds, describe the differences in strategy and design for delivering client education as compared to what you proportionately spend in a normal year.

Although we are not requesting additional funds, this issue needs to be addressed for future considerations: FCEOC has always maintained a very low average

billing per unit, serving more client households per budget dollar. Because of this, education has to increase by a factor of two to four times as much as normal. However, because we collect a fee from LIEE for a separate and differing education documentation, we are not asking for additional funds here. However, if there is an interruption to LIEE leveraging, we will continue to experience much more education than normal in our service area.

---

---

(2009 DOE WAP AMENDMENT 2)

## RAMP UP SCHEDULE

[illegible]

**EXHIBIT B**  
(Standard Agreement)

**RAMP UP SCHEDULE**

Agency:	2009			2010			2011			2012		
	1	2	3	4	5	6	7	8	9	10	11	12
Total	4	3	1	0	0	0	0	0	0	0	0	0
Job Creation - Subcontractors	Total	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31
Basic Weatherization	15											
Specialty (payroll)	1	1										
Other - (program support)	2	2										
Other - (outreach)	1	1										
Total	19	19	0	0	0	0	0	0	0	0	0	0
Vehicle & Equipment Purchases	Total	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31
Vehicles	0											
Equipment -	0											
Equipment -	0											
Equipment -	0											
Equipment -	0											
Total	0	0	0	0	0	0	0	0	0	0	0	0

Comments:

Instructions

- These schedules replace all previous ones submitted as part of the DOE ARRA Local Plan.
- CSD will be reviewing the aggregate totals on a statewide basis to determine if the State will attain the 30% of estimated completed dwellings by 9/30/10.
- If agency can not forecast any activity in the 3rd quarter (Jan - Mar 2010), specific reasons must be given in the comments section above. Please bear in mind that DOE and the administration have expressed that they want states to spend out as quickly as possible and that each agency should put their best estimate forward.
- Base estimates for unit production on current DOE measures, reimbursement rates and historical data.
- The formulas for calculating the average cost per unit and the health and safety measure maximum are included in this addendum.

## Expenditures by County -

- Enter the name of each county in your service territory on separate lines.
- For each county, enter the percentage of funds you plan to expend by the end of each quarter.

## Unit Production By County -

- Enter the name of each county in your service territory on separate lines.
- For each county, enter the number of units you plan to complete by the end of each quarter.

## Job Creations - Agency -

- Enter the number of employees by category that you estimate will be hired each quarter.

EXHIBIT B  
(Standard Agreement)

RAMP UP SCHEDULE

Agency:

- Categories - If a new hire fits into more than one category, count the person only once. Place them in the category that requires the most training per the proposed training coursework in the instructions.

Job Creations - Subcontractors

- Enter the estimated number of jobs that will be created by contracting with subcontractors for both basic wx and specialty work.
  - To help determine the number of jobs, base your estimate as if you were doing a direct hire rather than subcontracting.
- Vehicle & Equipment Purchases over \$5,000 per Unit
- Enter the quantity of vehicles and equipment in the quarter you are planning to make the purchases even if only a portion of the purchase will be charged to ARRA.

Note: Although this sheet is protected, there is no password. To remove the protection, go to Tools, choose Protection and lastly choose Unprotect Sheet.

2009		2010		2011		2012				
1	2	3	4	5	6	7	8	9	10	11

**Agency:** Fresno County Economic Opportunities Commission

**Subcontractor:** Sundowner Insulation

[illegible]



How many additional blower doors will you be purchasing for ARRA?						23
Blower Make / Model Number / Color	Acquisition Date (or date updated whichever is later) of Duct Blaster (excluding gauge)	General Condition of Duct Blaster (excluding gauge)	Gauge Make / Model / Type	Acquisition Date of Gauge	General Condition of Gauge	Date Gauge Last Sent to Manufacturer?
<b>Duct Blasters</b>						
Minneapolis/series-B/Black	06/24/02	ok	Minneapolis/DG-700	06/24/05	good	02/11/09
Minneapolis/series-B/Black	06/24/02	ok	Minneapolis/DG-700	06/24/05	good	02/12/08
Minneapolis/series-B/Black	06/24/02	ok	Minneapolis/DG-700	06/24/05	good	02/12/08
Minneapolis/series-B/Black	06/24/05	ok	Minneapolis/DG-700	06/24/05	good	02/12/08
Minneapolis/series-B/Black	06/24/05	ok	Minneapolis/DG-700	06/24/05	good	02/12/08
Minneapolis/series-B/Black	06/24/05	ok	Minneapolis/DG-700	06/24/05	good	02/12/08
Minneapolis/series-B/Black	06/24/05	ok	Minneapolis/DG-700	06/24/05	good	02/12/08
Minneapolis/series-B/Black	03/10/09	new	Minneapolis/DG-700	03/10/09	good	03/10/09
Minneapolis/series-B/Black	03/10/09	new	Minneapolis/DG-700	03/10/09	good	03/10/09
How many additional Duct Blasters will you be purchasing for ARRA?						17

### Instructions

Complete this form for your agency including all equipment you have whether or not you are currently using it in the field.

Complete a separate form for each subcontractor who performs basic weatherization services for your agency. This does not include subcontractors who are CSD service providers.

#### Acquisition Dates -

- If you do not have the acquisition date, please provide an approximate year that you purchased the equipment.

#### CO Analyzers -

- Last Calibration by Whom? - If the equipment was calibrated by an employee in-house using a kit, enter "In-House". If it was sent out to the manufacturer for calibration, enter "Manuf".

- Date Last Sent to Manufacturer - Enter the date that the equipment was last sent to the manufacturer for calibration, repair or any other reason. If you have not sent the equipment to the manufacturer since you acquired it, enter "N/A".

**Blower Doors & Duct Blasters -**

- Date Gauge Last Sent to Manufacturer? - Enter the date that the gauge was last sent to the manufacture for any reason. If you have not sent the equipment to the manufacturer since you acquired it, enter "N/A".

**Future Purchases -**

- Be certain to answer this question after each type of equipment. This will help CSD in negotiating some bulk purchase rates.

**Note:** Add more lines when necessary. The form is protected without a password. To remove the protection, go to Tools, choose Protection and lastly choose Unprotect Sheet.